CAPPS HR/Payroll & Financials — Combined User Group Meeting Minutes
Thursday, Feb. 24, 2022
9–11 a.m.
(Webinar Only)

I. **Welcome/Announcements** (Andrea Smith and Tony Martin)

- User Group meeting materials are posted on FMX.
    - To be added to the user group distribution list, email the CAPPS Governance and Communications team at: CAPPS.CGC.BA@cpa.texas.gov
    - This is a combined User Group meeting, so the team is presenting both HR/Payroll and Financials updates today.

II. **Production Update: Financials Support Requests (SRs)** (Tony Martin)

- **SR Summary and Trend Report**
    - Reviewed the CAPPS Financials Summary and Trend Report 02/24/22 document.
        - In January, there were 53 high priority status tickets in various stages of work and 262 active SRs.
        - There were no critical tickets to report. As shown on the trend chart, there were 327 SRs opened and 339 closed in January.
        - The increase in tickets opened from last year is due to quite a few configuration requests being submitted.
        - The downward trend for closed tickets this January is due to a decrease in code change requests.
- **Governance Approved Enhancements**
    - Reviewed the CAPPS Financials Governance Approved SRs 02/24/22 document. Updates since the last meeting are identified with an asterisk (*) and bolded.
        - SR 21712 adds the employee ID field to the receiving line asset and sets the employee's name to display only. This SR migrates to production on Feb. 24.
- **Required Maintenance**
    - Reviewed the CAPPS Financials Required Maintenance 02/24/22 document. Updates since the last meeting are identified with an asterisk (*) and bolded.
        - SR 22873 is now *in System Test* and migrates into production on March 30. This is a modification to assign the USAS effective date as the journal date when generated making for a more accurate update between CAPPS and USAS.
        - SR 26176 is *In Work* status with a production migration date of April 26. This is an update to the AM spreadsheet functionality.
        - SR 27765 is updating the Supplier Name and Supplier Short Name to the CMBL Load in CAPPS to enable mixed characters. This ticket is *In Work* with a migration date of April 26
        - SR 18706 adds the option to print deposit slips for local banks. This is in *Acceptance Testing – Statewide* and migrates into production on March 31.
        - SR 19436 is currently in *UAT* with a migration date of March 10. Updates made to the USPS Interface sends error notifications to users instead of agency and CAPPS support.
        - SR 26521 disables edit checks on the Empl ID and job codes to eliminate monthly issues. This ticket is *In Work* and will migrate on April 28.
        - SR 24572 is *In Work* with a migration date of April 28. This ticket adds the missing duplicate inv. Error message to the MVA voucher.
        - SR 23560 enhances the batch info messages to be clearer and more concise between USAS and CAPPS. The SR is *In Work and will migrate to production on April 28.*

- SR 22547 is for new USAS interface functionality that allows the USAS status to match for the HX and IN Browser. This SR *Migrated* on Jan. 17.
- SR 20340 is *Complete* as of Jan. 27. The SR restored transactions to IN Browser that were accidentally or incorrectly archived by adding an "Unarchive" feature — meaning agencies no longer have to submit a ticket to restore archived content.

III. **Production Update: HR/Payroll Support Requests (SRs)** (Andrea Smith)

- **SR Summary and Trend Report**
  - Reviewed the CAPPS HR/Payroll Summary and Trend Report 02/24/22 document.
    - There were 781 active SRs with 52 in high priority status in January.
    - As shown on the trend chart, there were 754 SRs opened and 700 closed. The high trend from last year is due to agency-specific CYE tickets still open for the duration of 1095-C processing. As agency forms are complete, SR tickets will be closed.

- **Governance Approved Enhancements**
  - The CAPPS HR/Payroll Governance Approved SRs 01/25/2022 document was reviewed. Updates since the last meeting are identified with an asterisk (*) and are bolded.
    - SR 28200 updated the candidate history details and recruiting – Source Yield reports to meet CAPPS Recruit OBI requirements. This SR was *Completed* on Feb. 17.
    - SR 28687 is now *Complete* and in production as of Feb. 17. The CAPPS Recruit Deployment team removed/retired 16 reports.
    - SR 31296 was completed on Jan. 28 that developed a custom agency all training report by division learner, group id and date range values.

- **Required Maintenance**
  - Reviewed the CAPPS HR/Payroll Required Maintenance 02/24/22 document. Updates since the last meeting are identified with an asterisk (*) and bolded.
    - SR 31320 was *Completed* as of Feb. 10. The *Position Control* module provided the ability to update the mail drop online.
    - SR 32905 is *In Rework* due to issues encountered in *UAT* and is now scheduled to migrate on April 14. This enhancement is specific to some of the SSN fields within the *Recruit* module.

IV. **Upcoming Vote: SRs Submitted to Governance** (Tony Martin, Rebecca Kelly and Pawan Kapany)

- Reviewed the Financials SRs Submitted to Governance 02/24/22 document.
  - SR 26236 intends to add the Email ID field to the TX_Q_PSOPRDEFN view.
  - The CAPPS Support team recommendations approval for this SR.
  - The vote for this SR will go out shortly after today's meeting.
- Reviewed the CAPPS HR/Payroll SRs Submitted to Governance 02/24/22 document.
- SR 35315 is a *configuration* to the correspondence message in CAPPS Recruit when a position is filled. CAPPS Recruit is requesting a change to the verbiage (for clarity) by removing who it was done by.
  - The CAPPS Support team recommendations approval for this SR.
  - The vote for this SR will go out shortly after today's meeting.
- SR 27091 requests to add a pop-up warning message to the exempt from withholding page in ESS.
  - The CAPPS Support team recommendations approval for this SR.
  - The vote for this SR will go out shortly after today's meeting.

V. **Project Update: Financials Fiscal 2022 Agency Deployment Project Dashboard** (Nyguel Sanders)
- Reviewed the CAPPS Financials Fiscal 2022 Agency Deployment Project Dashboard 02/24/22 document.
- The project is green and on track for both the soft go-live date on Aug. 08, 2022, and the implementation date on Sept. 01, 2022.
- Key items:
  - This project is now at 60% completion.
  - Phase 2 System Testing continues.
  - Configuration/Prototyping Sessions concluded.
  - Initiate Conference Room Pilots.

VI. **Project Update: HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard** (Diana Urban)
- Reviewed the CAPPS HR/Payroll Fiscal 2022 Agency Deployment Project Dashboard 02/24/22 document.
- The code move date is July 05, 2022. The implementation date is July 11, 2022. The project metrics are on track.
- Key items:
  - This project is now at 57% completion.
  - The Phase 2 Technical Design and Mock 3 conversion are complete.
  - Configuration Prototyping continues.
  - Mock 4 preparations are underway.
  - System Testing is underway.

VII. **Project Update: Recruit Fiscal 2022 Deployment Project Dashboard** (Diana Urban)
- Reviewed the CAPPS Recruit Fiscal 2022 Deployment Project Dashboard 02/24/22 document.
- The project is green and on track.
- Key items:
  - The project is now at 57% completion.
  - Conference Room Pilot (CRP) sessions are complete.
  - UAT session scheduling has been completed.
  - OIEC onboarding module Go-Live is planned for March 29, 2022:
    - CRP sessions are complete.
    - Configurations are nearly complete.
    - UAT began on Feb. 21 and will continue for three (3) weeks.

VIII. **Discussion Topic: Loading USPS and HR/Payroll Journals into CAPPS** (Shawana Abrams)
- SR 19436 is to create an alert notification related to the Uniform Statewide Payroll/Personnel System (USPS) and HR/Payroll journals that are sent to users when those journals have errors. The alerts are managed using a new control-M job.
  - The Control-M job processes Monday – Friday at 3:30 p.m.
  - Agencies are responsible for identifying which users receive the alert notifications and submitting a ticket to assign alert notifications to the user.
  - Agency Level 1s no longer receive SR emails concerning failures once this SR migrates.
- When a journal has an error:
  - The system generates an **N** Status (No Status; Needs to be Edited).
  - The TX_BATCH_INFO table is updated with an Exception message.
  - Users can view the journals that are in error by creating a query for the table.

- When submitting an SR to add alert notifications for a user, the agency must specify the user's name, CAPPS ID and query name. Also, select the alert notifications box and then select the alert definition (i.e., query name, process name and process category).
- This functionality is currently in UAT until March 4, 2022. It is schedule to migrate into Production on March 10, 2022.

IX. **Discussion Topic: Calendar Year-End (CYE) Updates** (Marissa Hoffman)

- All agencies have picked up W-2 forms by Jan. 28, making W-2 processing for 2021 is complete.
- W-3 file was completed by Jan. 31, 2022.
- The processing of 1095-C forms began Jan. 18, 2022 and is ongoing at this time.
  - Agencies will receive an update to their CYE SR when forms are printed and ready at the LBJ Warrant Window. ***NOTE:*** *Warrant Window hours are 8 –10 a.m. Please be sure to monitor CYE tickets for 1095-C pick-up/delivery notice.*
  - Agencies receiving paper 1095-C forms via FedEx must ensure the CYE ticket is updated upon receiving forms.
- The new *Agency Manage Employee 1095-C* forms page that allows agencies to retrieve replacement forms is now available. Agencies can now add/request the new TX_HCM_BN_MAINTAIN_ACA security role to gain access.

X. **Discussion Topic: Manager Self Service Transactions for Part-Time Employees** (Shelly Wilder)

- SR 26156 is currently in *UAT* and migrates to production on March 10.
- A correction to the Manager Self Service (MSS) Request Regular Merit process was made to allow salary changes for part-time employees to post correctly to the **Compensation** tab upon final approval.
- Agency Acceptance testing dates are February 28 through March 4.

XI. **Discussion Topic: Auto-Save for PM Document** (Richard Kral)

- A new auto-save functionality is being added to CAPPS as requested due to 30-minute session expiration window. This functionality will not auto-save any work or changes made while logged into CAPPS and can be retrieved if user is logged out or the session expires.
- Auto-saved data can be found under the audit history tab.
- Agency User Testing (UAT) is February 28 through March 4, and migration is scheduled for March 10.

XII. **Discussion Topic: HR/Payroll Fiscal 2022 Fluid Upgrades and Demonstration** (Allen Varghese, Himavantha Bode and Mohan Reddy Tirumala,)

- Fiscal 2022 is an Image and Tools upgrade year for PeopleSoft. This year's changes have a significant impact on the CAPPS HR/Payroll tower. The implementation date for all new code is scheduled for July 5, 2022.
- Some of the biggest changes coming this year include:
  - **Time and Labor:**
    - Fluid Timesheets – the custom timesheet currently used will be retired and the new fluid timesheet is being implemented for all users. This functionality is tracked via SR 31678.
    - Fluid Reported Time Approvals – implementing the Approval Workflow Engine (AWE) for routing approvals for time entered by employees. The ticket for this change is SR 32097.
    - Fluid Time and Labor WorkCenter – a new TL WorkCenters is being created for managers, time administrators and TL superusers. The WorkCenter organizes quick navigations to various TL pages and components. SR 31679 has the details of this functionality.

- Fluid Manage Exceptions will be available for time administrators and superusers. This is tracked via SR 31683.
- Time Summary and Time Calendar Views SR 32098 are delivered pages/components allowing various views into the *Reported Time and Payable Time* for selected employees. This change is tracked in SR 32098.
  - **Job and Position Data:**
    - Fluid Job Data – the Classic Job Data component is being removed and users can begin using Fluid Job Data. SR 31675 is the reference for this change.
    - Fluid Position Data – the upgrade removes *Classic Position Data* component and implement *Fluid Position Data* for position transactions. This change is tracked via SR 31677.
  - **Payroll:**
    - Fluid W-2/W-2c View Form – pages for the employee W-2/W-2c forms are being converted to the delivered fluid version. No changes are being made to the PDF format. This is tracked via SR 31685.
    - Fluid Direct Deposit Changes – minor changes are being made to SR 31686 that makes minor changes to the *Direct Deposit* page — but employee and superuser views will maintain the same look and feel. SR 31686 is the reference for this update.
- The CAPPS Support team provided a demonstration of the new Time and Labor functionality. A demonstration of the changes to Job/Position Data and Payroll will be provided at a future user group meeting.

XIII.   Upcoming Meetings
- Tuesday, March 22, 2022 — HR/Payroll User Group meeting.
- Thursday, March 24, 2022 — Financials User Group meeting.